

COUNTY OF MILWAUKEE
Inter-Office Communication

Date: May 5, 2008

To: Chairman Lee Holloway, Milwaukee County Board of Supervisors

From: Jerome J. Heer, Director of Audits

Subject: Information Management Services Division Help Desk Survey

Background

The Department of Audit has conducted a limited scope review of technology help desk customer service. These services were provided directly by staff of the Department of Administrative Services (DAS) Information Management Services Division (IMSD) until September 2006. The scope of this review was primarily a survey of 297 help desk users to identify the level of satisfaction with services in 2006 compared to 2007. We received 101 responses (34%) to our survey.

On March 28, 2006, a letter was sent to the County Board Chairman from the President of AFSCME Local Union 1654 expressing concerns about the potential outsourcing of Information Technology Help Desk Operations. The concerns were referred to the Chief Information Officer (CIO). The CIO responded that the 2006 Adopted Budget authorized the use of an outside provider for first level help desk inquiries as IMSD staffing levels decreased through attrition. The budget narrative indicated that this was part of the division's strategic initiative to improve service by training staff to support higher-end technology.

IMSD entered into a contract with CompuCom Systems, Inc. (CompuCom) for a 3-year period ending in December 2009. The contract was awarded as a cooperative purchase authorized by the Purchasing Administrator under s. 32.31 of the County Ordinances, relying on a recent competitive bidding process conducted by Waukesha County for help desk services.

There are three locations from which Milwaukee County help desk services are rendered; the City Campus building, the City Data Center located at City Hall, and the CompuCom office located in Dallas, Texas. When a person calls the Milwaukee County help desk, an automated answering system provides two options:

- Option 1 calls are for password resets and Lotus Notes configuration issues. Option 1 call are handled by County employees located at the City Campus Building (7 a.m. to 6 p.m.) and by County employees located at the City Data Center after hours, on weekends and holidays. There are currently four IMSD employees assigned to these functions.

- Option 2 calls are all other issues. These calls are handled by CompuCom agents, who are available 24 hours a day, seven days a week.

Milwaukee County's Statement of Work with CompuCom has a Minimum Monthly Incident Guarantee of 1,000 calls, a 'cushion' of 10% above the minimum, and a Price Per Incident above the cushion of approximately \$15.60. The monthly average for 2007 was 834 calls with the volume ranging from 645 to 1,524 incidents. During months that the number of incidents was lower than expected, the County paid the guaranteed minimum of approximately \$15,600. When the calls were higher than 1,100 the County paid the monthly minimum plus \$15.60 per incident above 1,100. An analysis of monthly invoices shows incidents exceeded the 1,100 threshold in only one month during 2007, suggesting the County should closely monitor this figure for possible adjustment in future contract periods.

According to interviews conducted with IMSD management staff there were no IMSD positions affected by the CompuCom contract in 2006. In 2007, two vacant Network Tech Specialist 4 positions were unfunded as a result of the outsourcing. The cost of the two positions were approximately \$229,320, including fringe benefits (approximately \$200,700 excluding legacy costs), compared to the cost of CompuCom services of \$201,300. In addition, there was a one-time start-up cost for Compucom of \$39,380.

Analysis

Detailed results of our survey are attached. The results indicate a fairly high level of satisfaction (94%) with the professional manner of help desk service in 2007. The level of knowledge (77%) and experience (76%) was lower but still reasonably high. The survey also indicated satisfactory resolution of problems within one day for (57%) of respondents and within 2-5 days for an additional (33%).

Overall level of "complete satisfaction" for 2007 and 2006 were similar (51% and 50%). However, when "partially satisfied" and "neutral" are added to the aggregate for 2007 and 2006, 34% thought services were better in 2006, 55% did not notice a difference, and 11% noted that services were worse in 2006.

Written responses throughout the survey show that most of the comments were from the minority of respondents that submitted negative numerical ratings. That is, highly critical or negative written comments were associated with negative numerical responses; these responses were clearly in the minority. Further, It should be noted that there were far fewer written comments compared to the numerical responses; for example in the area of technicians' professionalism there were a total of 97

numerical responses and 10 written comments. Our report includes summaries of both numerical and written comments to help provide a complete representation of users' satisfaction. The survey instrument and aggregated numerical results are shown in **Exhibit 1**. Detailed results, including written comments, have been provided to IMSD.

Help Desk Activity

In general, survey respondents contacted the help desk several times, which shows that the respondents have experience to draw from when completing this survey. Most help desk users contacted the help desk one to 10 times a year in 2007 and 2006 or 74% and 72% respectively. A fairly large amount of those surveyed called the help desk more than 10 times a year with 24% in 2007 and 27% in 2006. Although it is not surprising that some help desk users responded that they could not recall or could not accurately answer questions related to the number of times they contacted the help desk in 2007 and 2006.

Approximately, how many times did you contact help desk in 2007?

- A. 1 to 5 times
- B. 6 to 10 times
- C. 10 or more times
- D. I did not contact the help desk in 2007 (If you checked this response, please stop here and return the survey.

<u>Count</u>	<u>Percent</u>
52	53%
21	21%
24	24%
2	2%
99	100%

Approximately, how many times did you contact help desk in 2006?

- A. 1 to 5 times
- B. 6 to 10 times
- C. 10 or more times
- D. I did not contact the help desk in 2006 (If you checked this response, please stop here and return the survey.

<u>Count</u>	<u>Percent</u>
49	52%
19	20%
25	27%
1	1%
94	100%

Professionalism, Competence and Experience of Technicians

In the area of technicians' professionalism, 94% of respondents indicated their calls were handled in a professional manner. A few written comments indicated that the technicians did not handle calls in a professional manner, did not solve problems, or were rude. One user stated that they would prefer to send e-mails to IMSD when reporting problems because IMSD's help desk and not CompuCom typically handles e-mail requests. One help desk user indicated technicians handled calls in a professional manner the majority of the time.

When calling the help desk in 2007, did the technicians handle your call(s) in a professional manner?

- A. Yes
- B. No

<u>Count</u>	<u>Percent</u>
91	94%
6	6%
97	100%

Approximately 77% of respondents indicated they thought that technicians seemed knowledgeable. Written comments were mixed, with some indicating CompuCom's technicians did not seem knowledgeable and that only after calls were referred to IMSD's technicians were the problems resolved, while others indicated general satisfaction.

When calling the help desk in 2007, did the technicians seem to know what they were talking about?

- A. Yes
- B. No

<u>Count</u>	<u>Percent</u>
73	77%
22	23%
95	100%

Seventy-six percent of respondents indicated that technicians were experienced. Written comments included some users indicating that they could not understand why someone from Texas was handling their help desk calls. However, the majority of comments made were positive relating to the technicians' level of experience. In addition, if particular technicians answered the telephone, there were generally no problems at all.

When calling the help desk in 2007, did help desk technicians seem to be experienced with your system?

- A. Yes
- B. No

<u>Count</u>	<u>Percent</u>
73	76%
23	24%
96	100%

Satisfaction in 2007

To establish the level of satisfaction in 2007, users were asked when calling the help desk were calls handled satisfactorily and in a timely matter. Responses show that 57% of calls were handled within one business day and that 33% were handled within 2--5 business days, meaning 90% of calls were

handled within 1--5 business days, and 10% of calls took longer than five days to resolve or were never resolved.

When calling the help desk in 2007, was your issue satisfactorily resolved in a timely manner?

- A. Issue resolved within one business day
- B. Issue resolved within 2-5 business days
- C. Issue was never satisfactorily resolved
- D. Longer than 5 business days

<u>Count</u>	<u>Percent</u>
57	57%
33	33%
2	2%
8	8%
100	100%

Rating their overall experience in 2007, 64% of respondents indicated that they were completely satisfied or partially satisfied. Only 17% of respondents indicated they were partially dissatisfied or completely dissatisfied, and 19% were neutral.

Please circle your overall experience and/or share any other comments related to the help desk in 2007.

- A. Completely Satisfied
- B. Partially Satisfied
- C. Neutral
- D. Partially Dissatisfied
- E. Completely Dissatisfied

<u>Count</u>	<u>Percent</u>
48	50%
14	14%
18	19%
10	10%
7	7%
97	100%

For respondents that provided written observations, some comments indicated that they would rather contact the help desk by e-mail, which assures users that they would receive Milwaukee County's help desk. In addition, more comments were made relating to having a remote help desk as a disadvantage to users and that CompuCom is not escalating tickets correctly or acknowledging departments by priority.

“On Hold” Calls

Help desk users were asked how often they were put on hold in 2007. Only 17% indicated that they were never put on hold. However, 69% specified that they were put on hold rarely or sometimes, and 14% were often to always put on hold. In terms of typical waiting periods on hold for 2007, 90% indicated that they were put on hold for five minutes of less and 10% were put on hold between 6 to 10 minutes. Help desk users were asked to compare 2006 to 2007, and the amount of time placed on

hold. We found that 42% of respondents indicated that the hold times were about the same in 2006 and 2007, with 23% cited longer hold times and 24% indicated shorter hold times.

When calling the help desk in 2007, how often were you put on hold?

- A. Never
- B. Rarely
- C. Sometimes
- D. Often
- E. Always

<u>Count</u>	<u>Percent</u>
16	17%
37	39%
29	31%
9	9%
4	4%
95	100%

If you were put on hold when calling the help desk in 2007, please indicate which response best describes the typical waiting period.

- A. 5 minutes or less
- B. 6 to 10 minutes
- C. 10 minutes or longer

<u>Count</u>	<u>Percent</u>
70	90%
8	10%
0	0%
78	100%

If you were put on hold when calling the help desk in 2007, please indicate which response best describes your experience compared to 2006.

- A. Hold times were longer in 2007 than in 2006
- B. Hold times were about the same in 2007 and 2006
- C. Hold times were shorter in 2007 than in 2006
- D. I was never put on hold when calling the help desk in 2006
- E. I never called the help desk in 2006

<u>Count</u>	<u>Percent</u>
16	23%
30	42%
17	24%
8	11%
0	0%
71	100%

Satisfaction in 2006 and Comparison of 2006 to 2007

Seventy-six percent of survey respondents indicated that they were completely or partially satisfied with their overall help desk experience in 2006, with 4% either completely or partially dissatisfied and 20% neutral.

Help desk users were asked to describe their experience by comparing 2006 to 2007. Responses indicate that 55% did not notice a difference, 34% indicated that their experience was better in 2006 and 11% indicated that service was worse in 2006.

Please circle your overall experience and/or share any other comments related to the help desk in 2006.

- A. Completely Satisfied
- B. Partially Satisfied
- C. Neutral
- D. Partially Dissatisfied
- E. Completely Dissatisfied

<u>Count</u>	<u>Percent</u>
46	51%
23	25%
18	20%
3	3%
1	1%
91	100%

If you had a chance to call the help desk in 2006, please check the answer that most accurately describes your experience.

- A. Service was much better in 2006 than in 2007
- B. Service was somewhat better in 2006 than in 2007
- C. Did not notice a difference between service in 2006 and 2007
- D. Service was somewhat worse in 2006 than in 2007
- E. Service was much worse in 2006 than in 2007
- F. I did not contact the help desk in 2006

<u>Count</u>	<u>Percent</u>
19	22%
10	12%
47	55%
8	9%
2	2%
0	0%
86	100%

The relatively small number of written comments relating to overall experiences in 2006 compared to 2007 predominately favored the in-house experience of 2006.

Outsourcing Help Desk Services

Forrester Research, Inc., an independent technology and marketing research company, provides advice to global leaders in business and technology. In a report entitled *Making an IT Help Desk Outsource Decision*, Forrester notes that help desk outsourcing is increasing due to standardization of services, competition among vendors and the introduction of advanced technologies. However, Forrester also notes that “the risks for help desk outsourcing are high since the help desk remains the most frequent interface for IT with the business, drops in service level are quickly notice by customers and complaints are voiced to business leaders.” Help desk users are expecting service levels to remain the same even if services are outsourced, and when the customer service level drops or when technicians do not receive the level of customer service expected complaints could occur. There is also the added pressure on CompuCom of added scrutiny when involved in a privatization, which could amplify any mistakes made as reflected in the written comments.

There were some added benefits of having CompuCom as a vendor in December of 2007, when the call volume doubled due to implementation of the County's new Ceridian automated payroll system. The help desk was able to handle the increase in calls and has provided better reporting and tracking of incidents. This situation involved a drastic increase in incidents and calls due to the installation of the Ceridian Time and Attendance System. The previous monthly average of incidents was 834 calls and in December the calls nearly doubled to 1,524. A large number of calls were related to users not being able to access the various Ceridian Systems and password resets. Ceridian has Time and Attendance, Self -Service, Benefits and HR/Payroll, which some have separate passwords and could create a large number of system access calls. The County paid approximately \$6,600 (424 x \$15.60) to handle the increase in calls.

In this case CompuCom afforded IMSD the flexibility to handle each drastic increase in calls, which could have been overwhelming for the help desk. Another positive implementation that CompuCom suggested was to use front-end announcements when users call the help desk stating that there are "no known outages" or "that we are experiencing problems with a particular system." In addition, these messages are sent on e-mail alerting users of outages. CompuCom has provided other added benefits to the help desk.

In spite of IMSD's success with CompuCom, it is important to note that outsourcing does not reduce the need for accountability. During the interview process IMSD management staff expressed the need for complete and accurate reports, which are provided by CompuCom. However, a baseline for comparison is not available because historical information from 2005 and 2006 is not readily available or deemed reliable. CompuCom has provided a vehicle to track calls, average speed of answer, call abandonment rates and calls in queue. IMSD believes that this type of accurate tracking information improves customer service levels. According to reports provided by CompuCom, the firm has exceeded agreed upon service levels. In addition, during an interview with Waukesha County management, they indicated they are extending their contract with CompuCom for an additional year because they were pleased with the level of customer service and reports provided.

Although service tracking information is available, interviews with the help desk staff at City Campus and with CompuCom confirmed that there are no records maintained of complaints lodged by customers. IMSD management stated that when a complaint is e-mailed, the complaint is covered with the employee. However, complaints are not kept in a central file. CompuCom stated that complaints are used for training tools and that agents are given written test every six months related to problems that

have occurred and are required to take the test until the agent passes the test. It is important to note that IMSD had a complaint management system prior to hiring CompuCom.

According to an article published by Forrester titled, Thirty–One Best Practices for The Service Desk, “These days, there is little reason not to be using an incident or problem management product to track calls and their resolutions. Data collection is the first step to a systematic improvement process. With good data, you can identify trends, recognize star performers and intercept future problems. Without good data, an educated guess is the best that is possible, and even here, it’s tough to track the impact of changes. If you’re not ready to buy and implement a solution in-house, look at hosted application or rentals.”

Conclusions and Recommendations

Overall, there has been an acceptable level of satisfaction with services provided by CompuCom. However, to help ensure that outsourcing help desk service is not adversely impacting the level of expected customer service to end users and to help assure that accurate tracking and reliable data collection continues we recommend that IMSD:

1. *Conduct a survey immediately after users call the help desk.*
2. *Maintain a log or file of complaints made.*
3. *Follow-up with CompuCom and or IMSD employees on any complaints.*
4. *Use a reliable tracking system that identifies trends, monitors call activity and facilitates problem resolution.*

Jerome J. Heer

JJH/cah

cc: Milwaukee County Board of Supervisors
Dennis John, Chief Information Officer, DAS-IMSD
Scott Walker, Milwaukee County Executive
Terrance Cooley, Chief of Staff, County Board Staff
Delores Hervey, Chief Committee Clerk, County Board Staff

Audit Scope

We conducted a survey of user satisfaction with the technology support help desk. This audit was performed under a limited scope as described in GAS 3.15 and for which additional safeguards are not required.

We limited our review to the areas as specified in this scope section. During the course of the audit we:

- Completed a satisfaction service for IMSD Help Desk users and conducted an analysis of survey results;
- Interviewed appropriate IMSD management and staff;
- Reviewed Adopted County budgets relating to Department of Administrative Services, Information Management Services Division relating to the Technical Support and Infrastructure area from 2006 through 2008;
- Reviewed County Board files, reports, correspondence and the contract between Milwaukee County and CompuCom Systems Inc.;
- Reviewed Request for Proposal for Help Desk Services from Waukesha County, and the Bid Process that lead to CompuCom Systems, Inc. being selected as a vendor;
- Reviewed IMSD Help Desk Survey from 2006;
- Observed Help Desk Operations and attended a daily conference call with CompuCom; and
- Interviewed CompuCom's management staff, reviewed documents and reports related to Help Desk operations.

**Exhibit 1
(Page 1 of 2)**

1. Approximately, how many times did you contact the help desk in 2007?

- A. 1 to 5 times
- B. 6 to 10 times
- C. 10 or more times
- D. I did not contact the help desk in 2007 (If you checked this response, please stop here and return the survey.)

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	52	53%
B	21	21%
C	24	24%
D	2	2%
Total	99	100%

2. Approximately, how many times did you contact the help desk in 2006?

- A. 1 to 5 times
- B. 6 to 10 times
- C. 10 or more times
- D. I did not contact the help desk in 2006 (If you checked this response, please stop here and return the survey.)

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	49	52%
B	19	20%
C	25	27%
D	1	1%
Total	94	100%

3. When calling the help desk in 2007, did the technicians handled your call(s) in a professional manner?

- A. Yes
 - B. No
- If no, please explain _____

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	91	94%
B	6	6%
Total	97	100%

4. When calling the help desk in 2007, did the technicians seem to know what they were talking about?

- A. Yes
 - B. No
- If no, please explain _____

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	73	77%
B	22	23%
Total	95	100%

5. When calling the help desk in 2007, did help desk technicians seem to be experienced with your system?

- A. Yes
- B. No

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	73	76%
B	23	24%
Total	96	100%

6. When calling the help desk in 2007, was your issue satisfactorily resolved in a timely manner?

- A. Issue resolved within one business day
- B. Issue resolved within 2-5 business days
- C. Issue was never satisfactorily resolved
- D. Longer than 5 business days

Please explain _____

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	57	57%
B	33	33%
C	2	2%
D	8	8%
Total	100	100%

7. When calling the help desk in 2007, how often were you put on hold?
(Circle only one)

- A. Never
- B. Rarely
- C. Sometimes
- D. Often
- E. Always

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	16	17%
B	37	39%
C	29	31%
D	9	9%
E	4	4%
Total	95	100%

Exhibit 1
(Page 2 of 2)

8. If you were put on hold when calling the help desk in 2007, please indicate which response best describes the typical waiting period.

A. 5 minutes or less
B. 6 to 10 minutes
C. 10 minutes or longer

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	70	90%
B	8	10%
C	0	0%
Total	78	100%

9. If you were put on hold when calling the help desk in 2007, please indicate which response best describes your experience compared to

A. Hold times were longer in 2007 than in 2006
B. Hold times were about the same in 2007 and 2006
C. Hold times were shorter in 2007 than in 2006
D. I was never put on hold when calling the help desk in 2006
E. I never called the help desk in 2006

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	16	23%
B	30	42%
C	17	24%
D	8	11%
E	0	0%
Total	71	100%

10. Please circle your overall experience and/or share any other comments related to the help desk in 2007. (Circle only one)

A. Completely Satisfied
B. Partially Satisfied
C. Neutral
D. Partially Dissatisfied
E. Completely Dissatisfied

Comments: _____

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	48	50%
B	14	14%
C	18	19%
D	10	10%
E	7	7%
Total	97	100%

11. Please circle your overall experience and/or share any other comments related to the help desk in 2006. (Circle only one)

A. Completely Satisfied
B. Partially Satisfied
C. Neutral
D. Partially Dissatisfied
E. Completely Dissatisfied

Comments: _____

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	46	51%
B	23	25%
C	18	20%
D	3	3%
E	1	1%
Total	91	100%

12. If you had a chance to call the help desk in 2006, please check the answer that most accurately describes your experience:

A. Service was much better in 2006 than in 2007
B. Service was somewhat better in 2006 than in 2007
C. Did not notice a difference between service in 2006 and 2007
D. Service was somewhat worse in 2006 than in 2007
E. Service was much worse in 2006 than in 2007
F. I did not contact the help desk in 2006

Comments: _____

<u>RESPONSE</u>	<u>COUNT</u>	<u>PERCENT</u>
A	19	22%
B	10	12%
C	47	55%
D	8	9%
E	2	2%
F	0	0%
Total	86	100%